

**Systems Management
Research Programme
Briefing**

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Systems Management Programme

Europe

Systems Integration Studies:

- Market analysis
- User analysis
- Vendor strategies

INPUT
SEMKT-KH-2

Notes

Systems Management
Programme—Europe

Systems Operation (FM) Studies:

- Market analysis
- User analysis
- Vendor strategies

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Notes

Client Support:

- Access to consultants
- Hotline inquiry service
- Client meetings
- On-site visits

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Notes

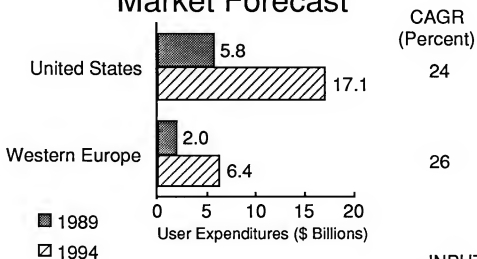
Current SI Definition

- A business offering
- Complete solution to complex requirement for:
 - Information systems
 - Networking
 - Automation
- Custom selection and implementation of products and services

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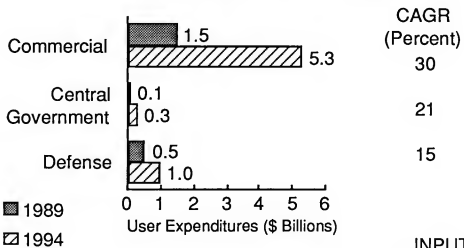
Notes

Systems Integration Market Forecast



Notes

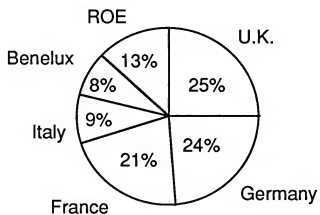
Systems Integration Western Europe, 1989-1994



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Notes

Commercial SI—Western Europe

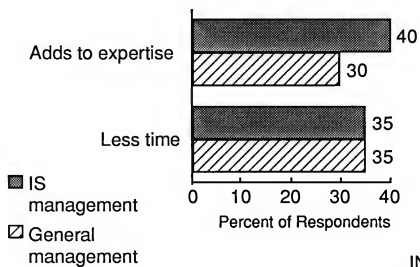


1989 Market: \$1.5 Billion

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Notes

Benefits from Contracting

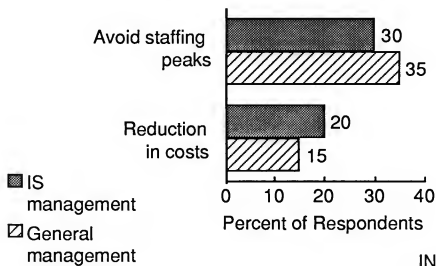


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Notes



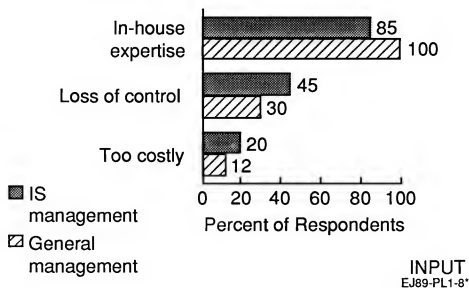
Benefits from Contracting



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Notes

Subcontracting Resistance



Notes

Major Vendor Issues—1989

- Full service suppliers
 - "Business change" consulting
 - Systems operation
- Increasing competition
 - Skills
 - Clients

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Notes



SI Competition Ranked by Vendors

- Commercial
 - Andersen Consulting
 - EDS
 - IBM
 - DEC

By number of mentions

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Notes

SI Projects Are Successful When:

	Rating
Well-disciplined program management system	4.3
Clients establish project offices	4.0

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Notes

Major Causes of SI Failure Are:

	Rating
Integrators bid jobs with inadequate specifications	4.2
Integrators bid jobs beyond resources/capabilities	4.1
Clients not involved in implementation process	4.1

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Notes



Conclusions

- SI business acquisition
 - Opportunity qualification
 - ° Review and screening
 - ° Analysis
 - ° Market focus
 - Employ risk mitigation in proposal development

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Notes

Vendor Recommendations

- Develop/expand business consulting skills
- Involve program managers in business acquisitions
- Use repeatable processes, strive for end-to-end methodologies

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Notes



Systems Management
Programme
Western Europe (1990)

The Management Problem

Topics

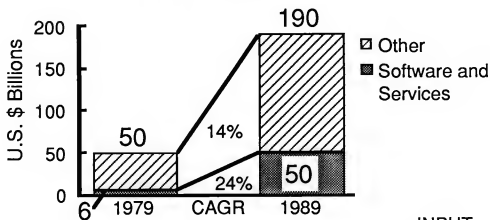
- Market size
- Market structure
- Management problem
- Business implications

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SEMKT-HT-2

Notes



Total IT Expenditure— W. Europe

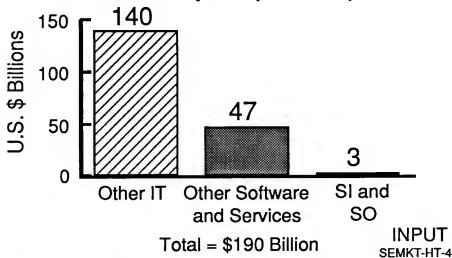


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Notes



Total IT Expenditure— W. Europe (1989)



Notes

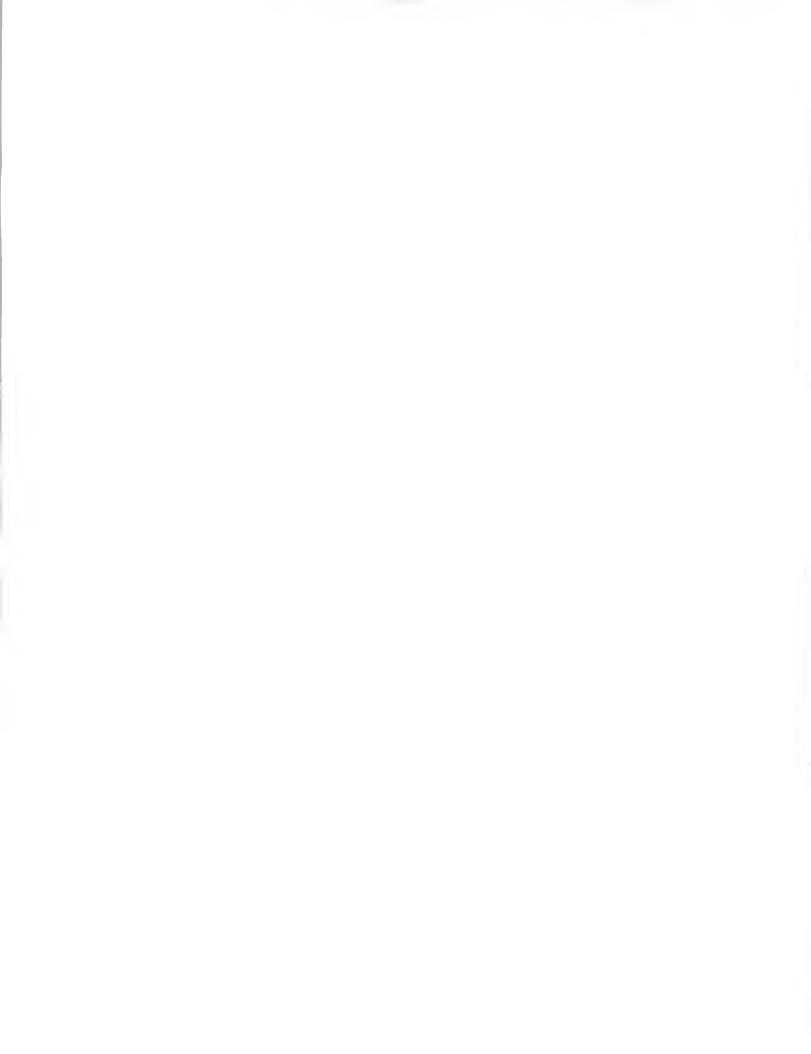


Market Structure Consulting



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Notes

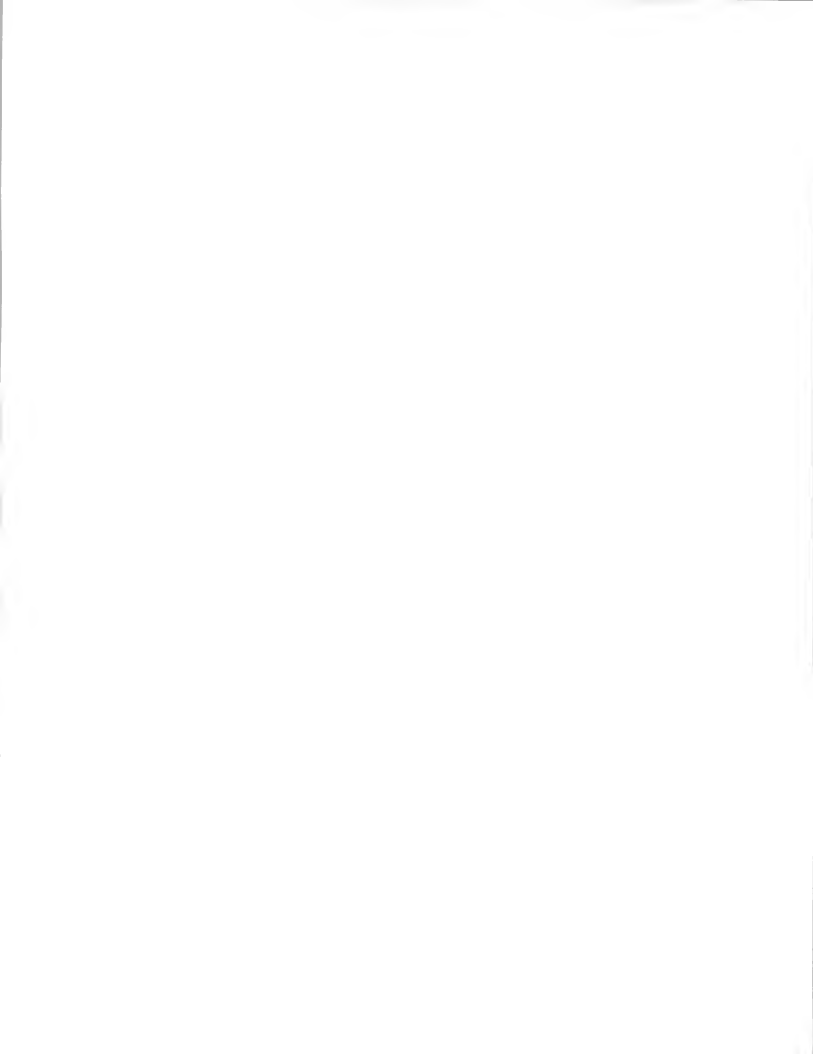


Market Structure Developing



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Notes



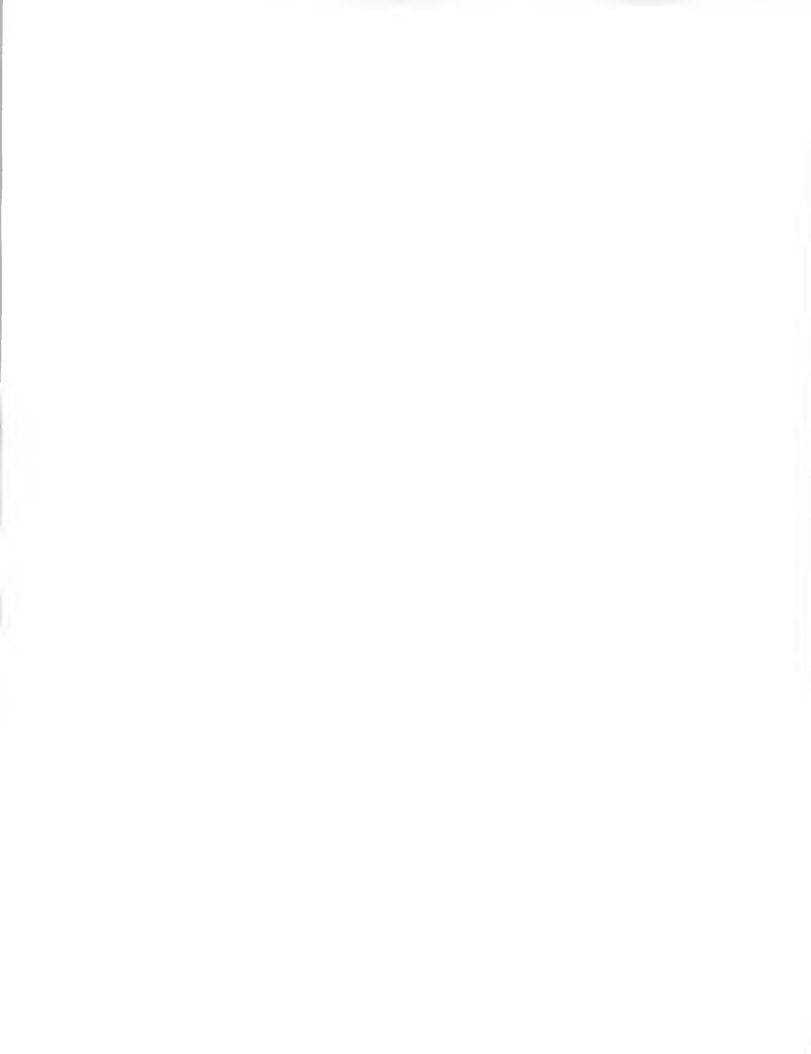
Market Structure



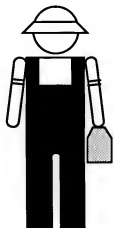
Operating

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Notes

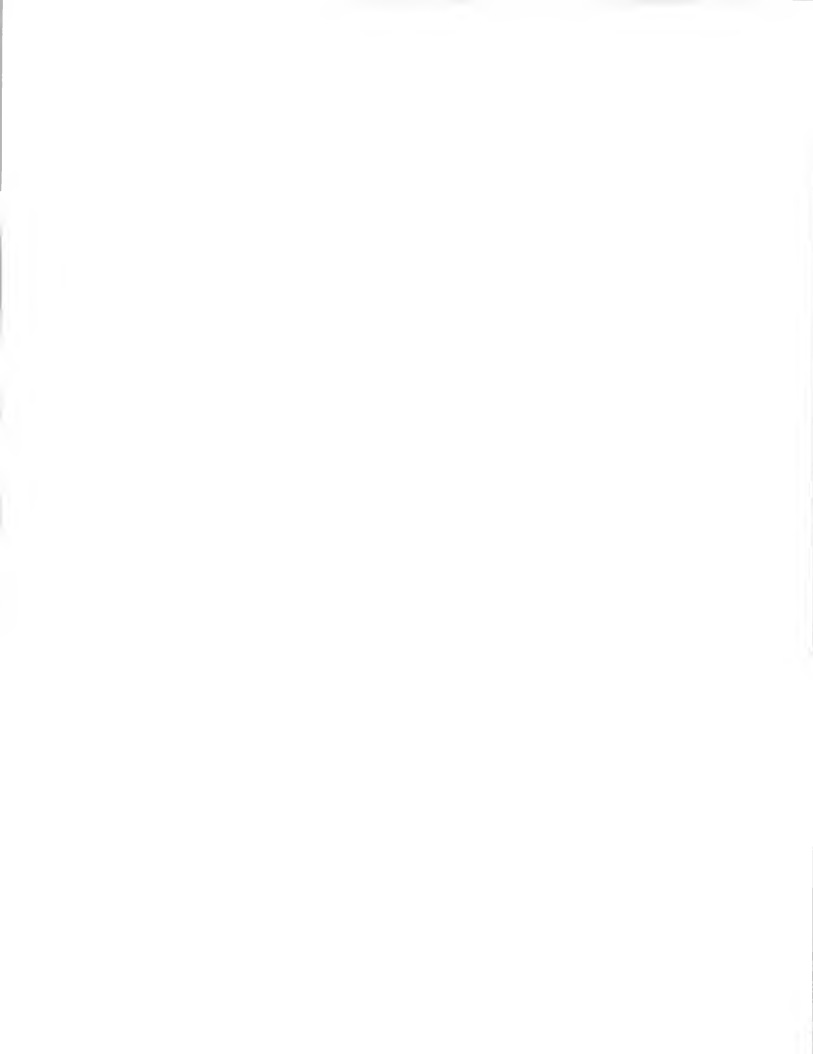


Market Structure Maintaining



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Notes



Market Structure

- Consulting
- Developing
- Operating
- Maintaining

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Notes

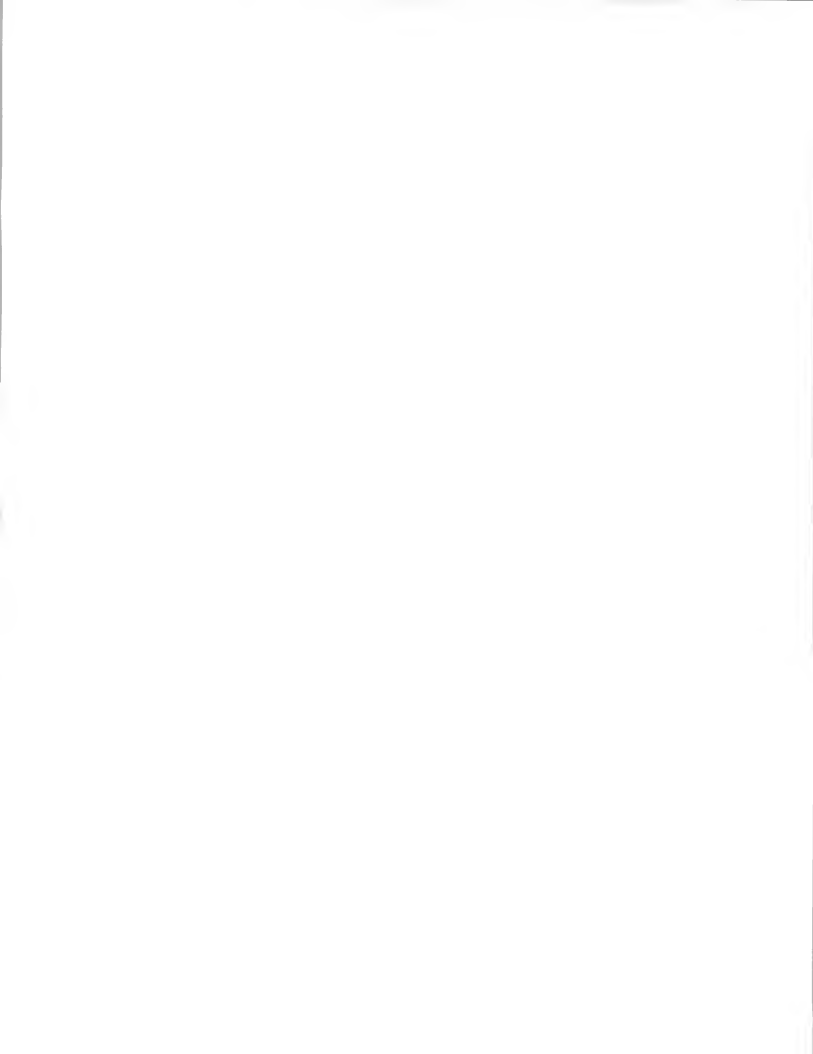


Changing Market

- Growth
- Protect client base
- Response to client
- Door-opening

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Notes

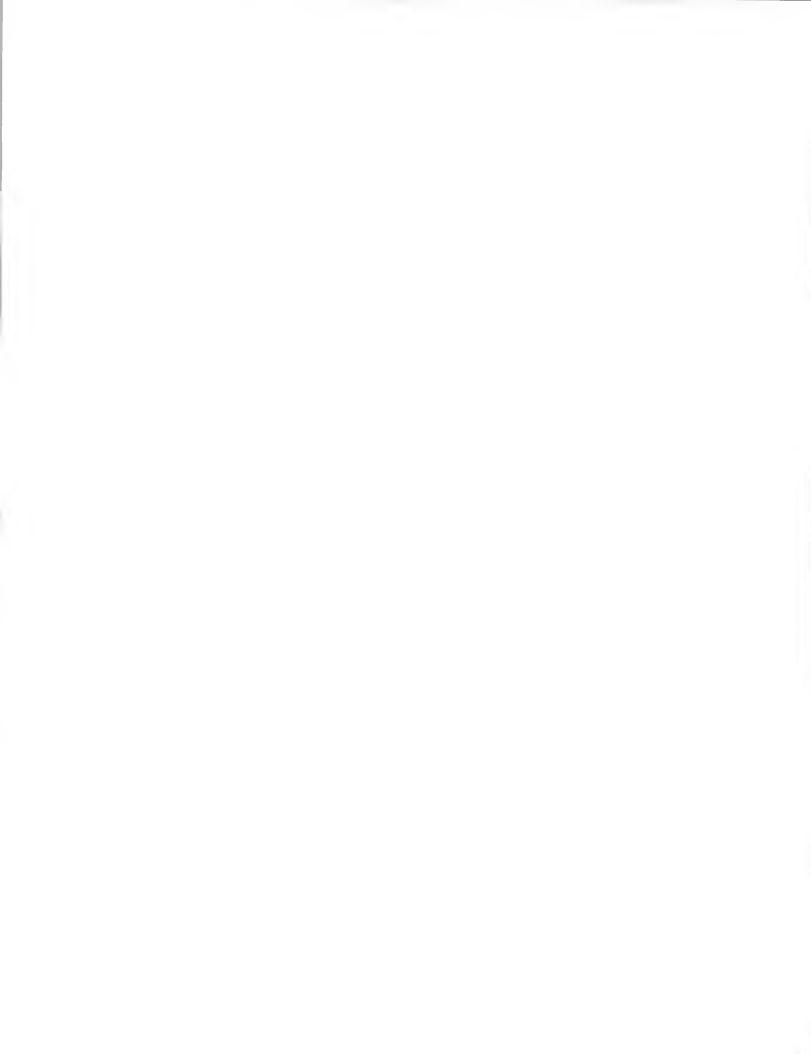


The D.P. Management Problem

- Database
- Methodology
- Quality assurance
- Development tools
- Staff

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Notes

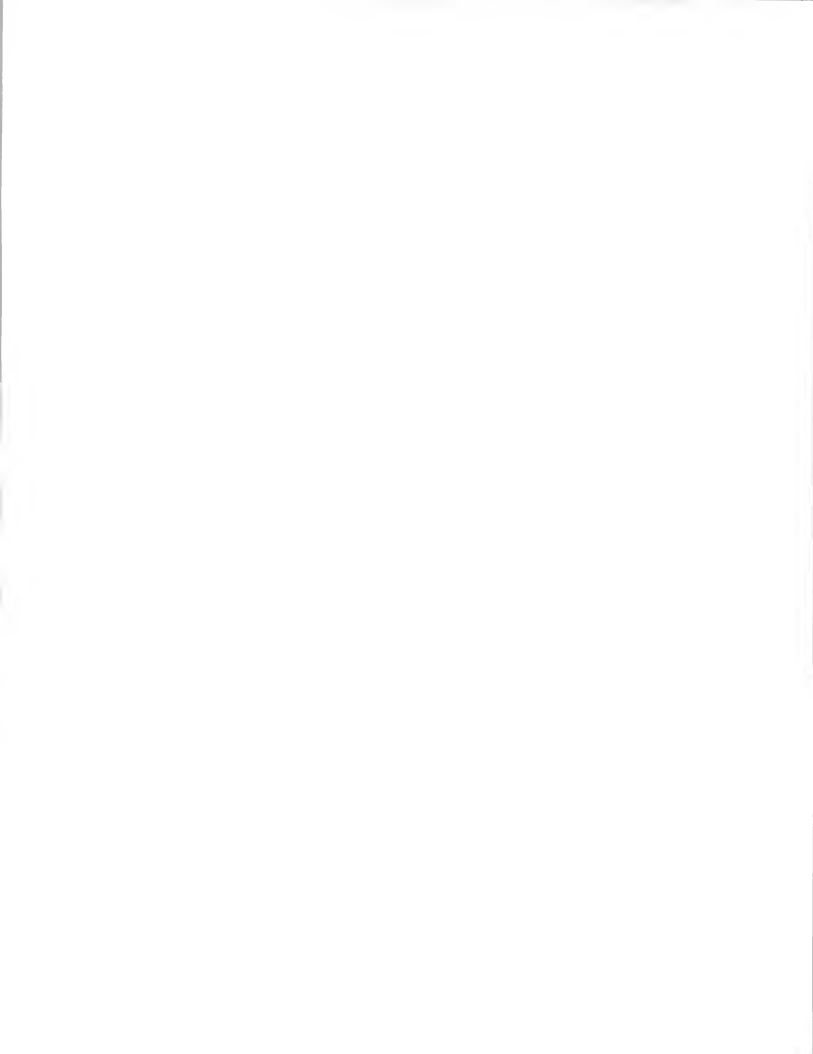


The Corporate Management Problem

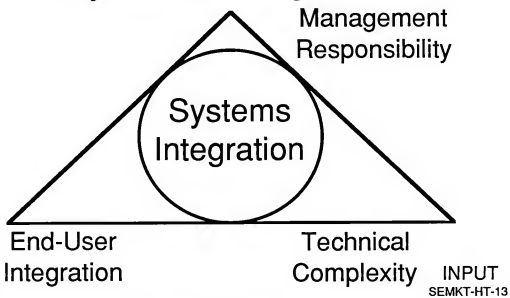
- Changing markets
- Differentiation
- Technology
- Scope
- D.P. department

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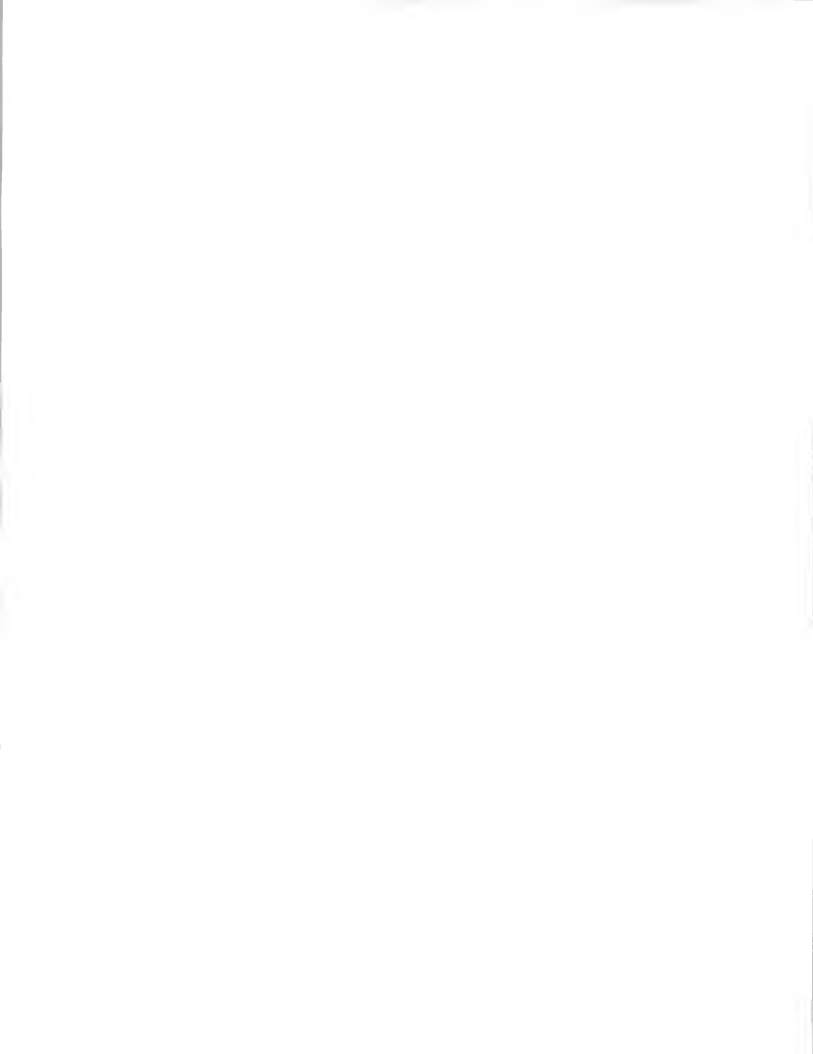
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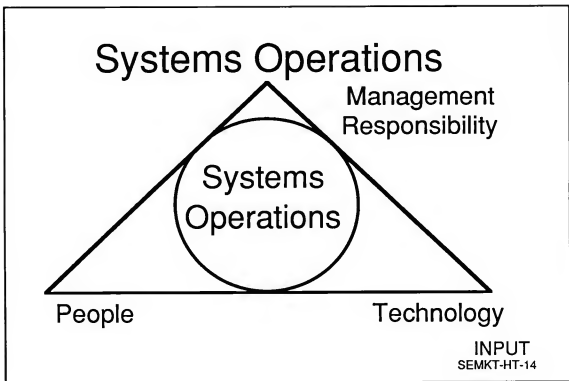


Systems Integration



Notes

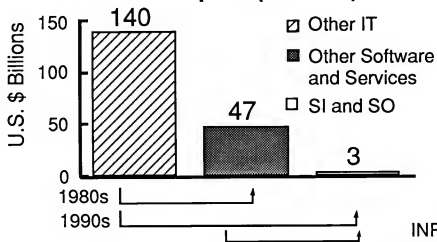




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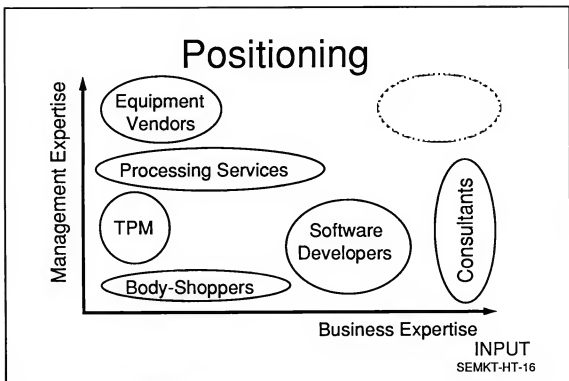


Total IT Expenditure— W. Europe (1989)

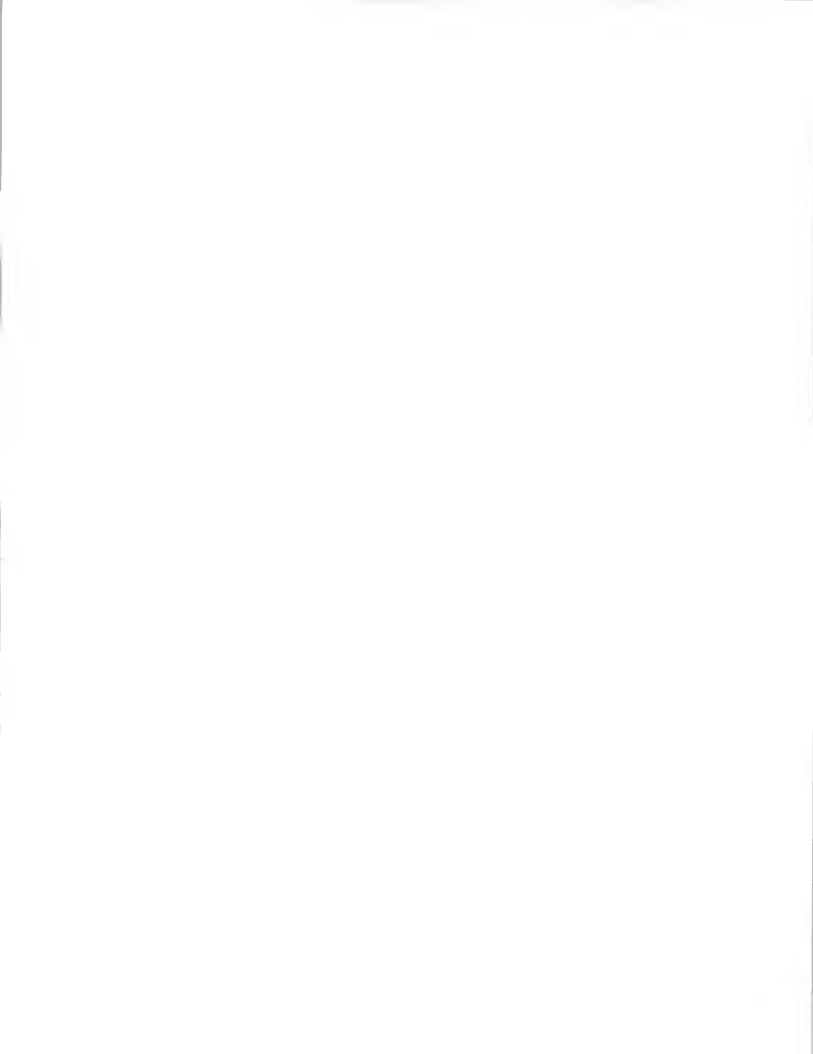


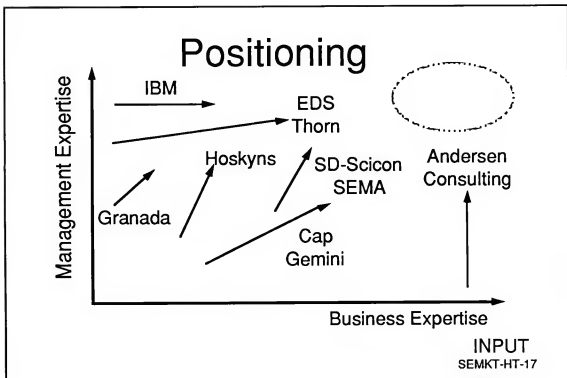
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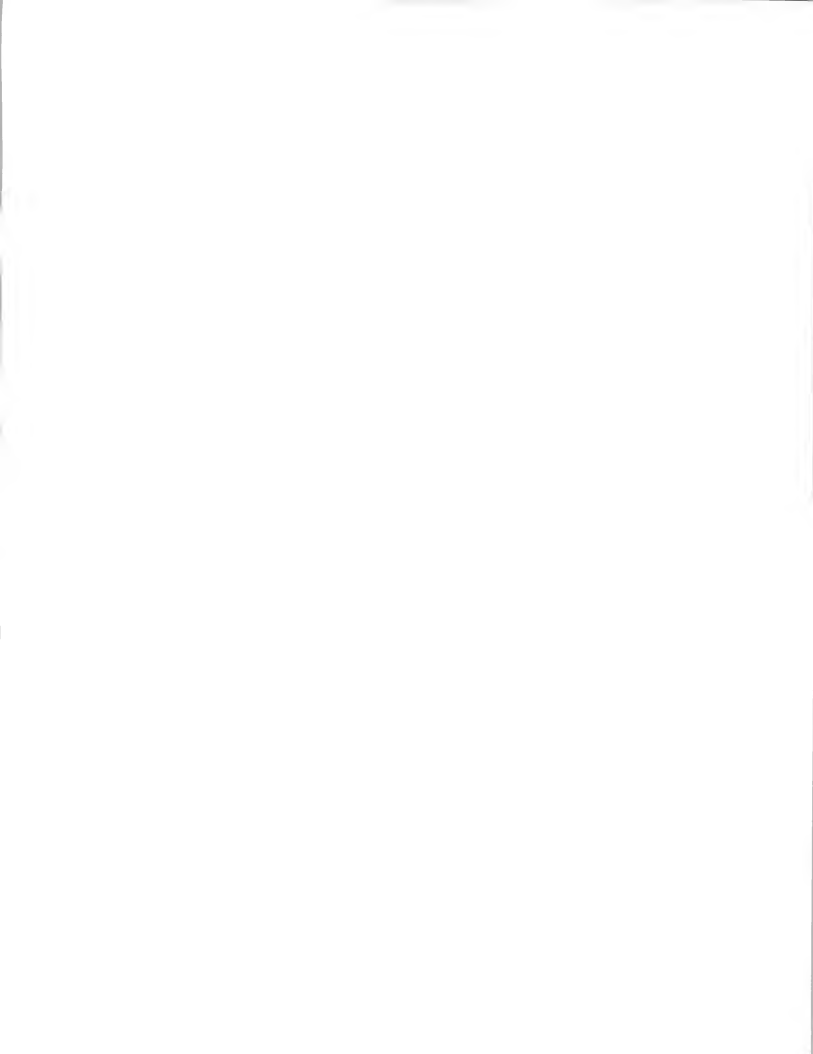


Notes





Notes

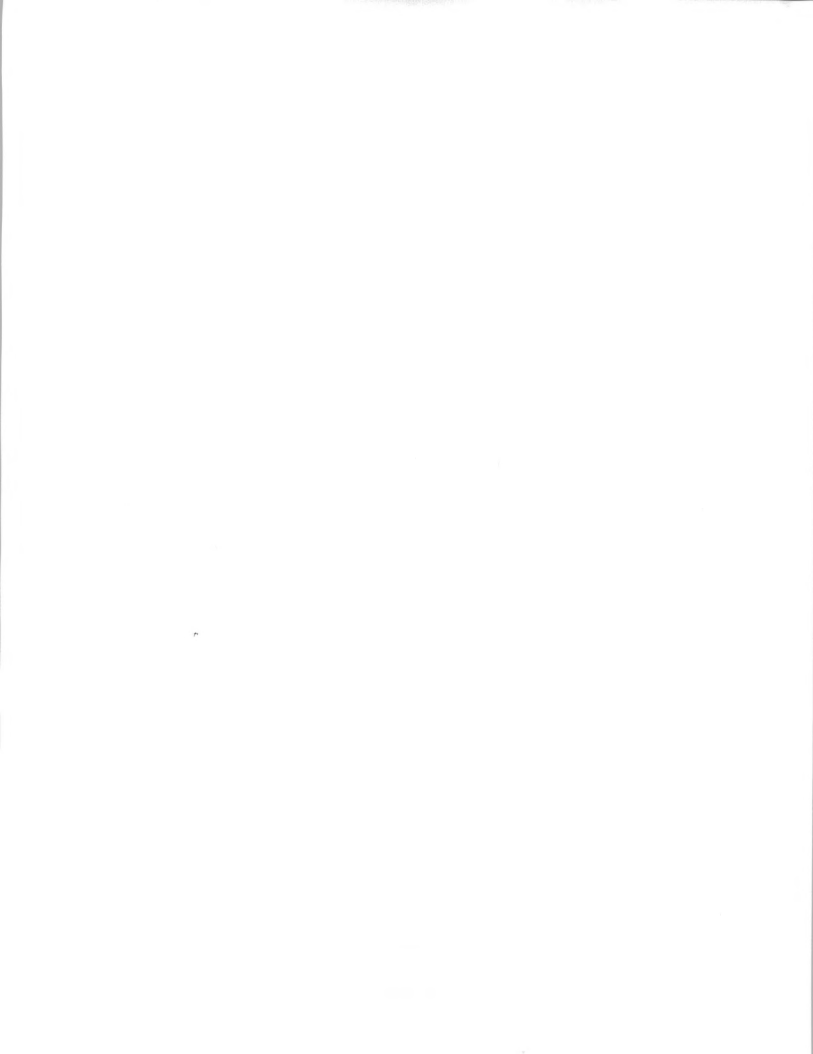


Business Implications— Opportunities

- High value
- Strong client relationship
- Account development
- Account protection
- Market leadership
- Industry markets

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Notes

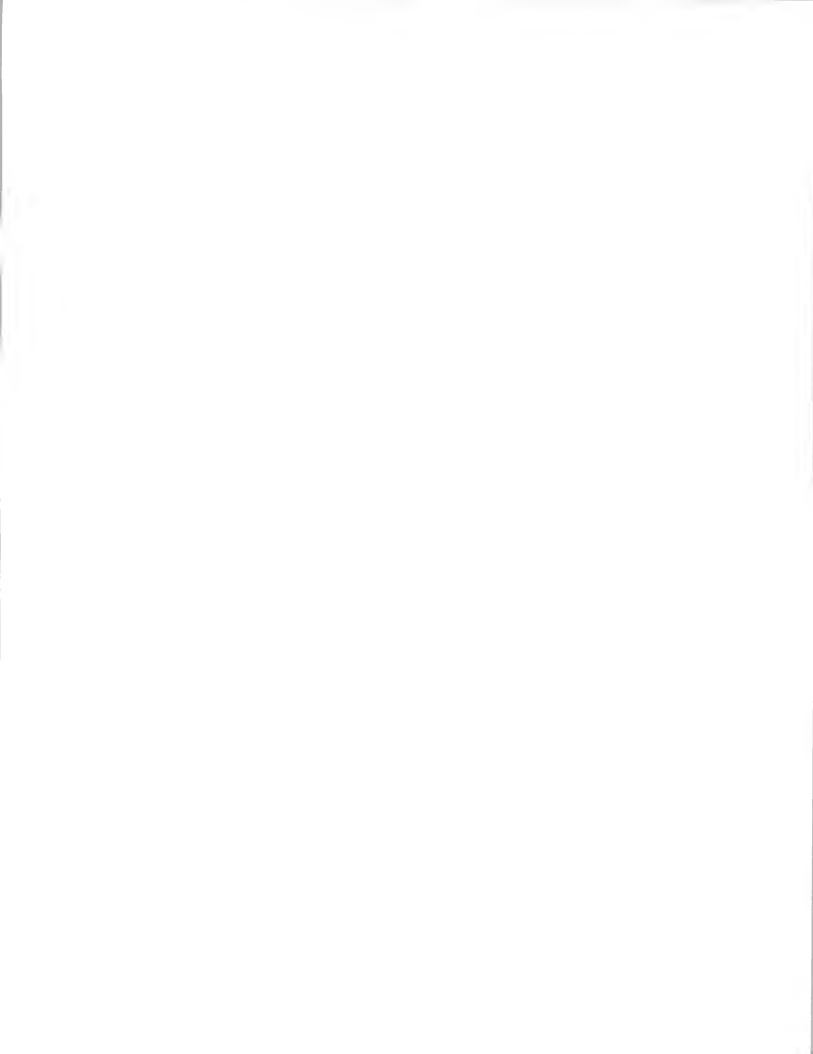


Business Implications— Challenges

- Long-term
- High investment
- High risk
- Skills
 - Project management
 - Functional management
 - Account management
 - International capability

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Notes

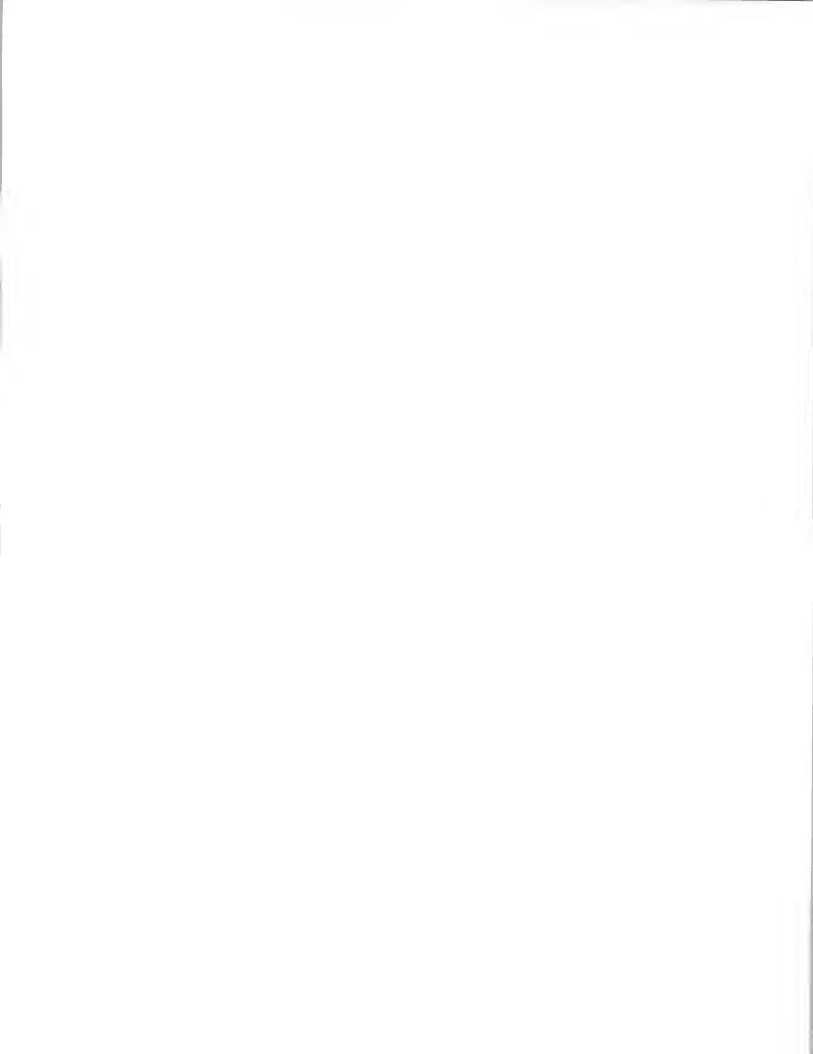


Systems Management Programme

- Systems Integration and Systems Operations
 - Size
 - Structure
 - Forecast
 - Country markets
 - Industry markets

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SEMKT-HT-20

Notes



Systems Management Programme

- Systems Integration and Systems Operations
 - Trends
 - Technology
 - Profitability
 - Skills
 - Other issues

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SEMKT-HT-21

Notes



Systems Management Programme

- Systems integration and systems operations
 - User attitudes
 - User experiences
 - Vendor activities
 - Vendor profiles

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SEMKT-HT-22

Notes



Conclusion

Management Problem



Management Opportunity

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Notes



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INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

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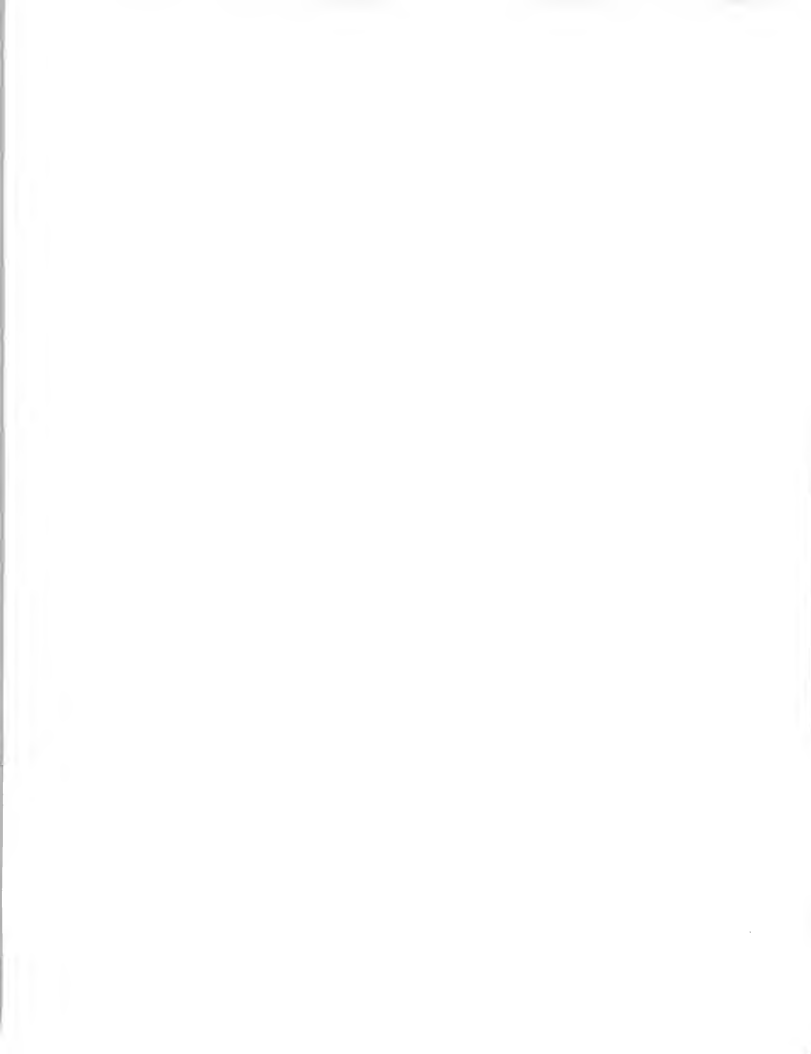
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System Management Programme

Europe

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SYSTEMS

System Management
Programme—Europe

Systems Integration Studies

- Market analysis
- User analysis
- Vendor strategies

INPUT
SYSTEMS

SYSTEMS

System
Program

System
Program

System Operation (I.M.) Studies:

- Market analysis
- User analysis
- Vendor strategies

INPUT
SYSTEMS

System Management
Programme—Europe

Client Support:

- Access to consultants
- Hotline inquiry service
- Client meetings
- On-site visits

INPUT
SYSTEMS



SYSTEMS MANAGEMENT

PROGRAMS - ENABLER



SYSTEMS MANAGEMENT PROGRAMME

EUROPE

SYSTEMS INTEGRATION STAGES :-

- 0 MARKET ANALYSIS
- 1 USER ANALYSIS
- 2 VENDOR STRATEGIES



SYSTEMS MANAGEMENT PROGRAMME

EVALUATE

SYSTEMS OPERATIONS STUDIES

• MAINT ANALYSIS

• USER ANALYSIS

• VERSION STATE VIEWS



SYSTEMS MANAGEMENT PROGRAMME

EUROPE

CLIENT SUPPORT :-

• ACCESS TO CONSULTANTS

• 'HOTLINE' INQUIRY SERVICE

• CLIENT MEETINGS

• ON-SITE VISITS



On May 1982
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ATTENTION:

TELEPHONE NUMBER: 01 493 9335

COMMITTEE: PAGES

1 18

CONFIDENTIAL: AL CORE PROGRAM

YES

URGENT

YES

NO
NO

DISCUSSION

Andrea

*...? How could I have these materials
by the end of next week, I need them for
our seminar.*

*If it is no trouble, a set of overheads
would be handy too.*

Thanks,

Henry

INPUT

Printing Services for Management

HENRY TROLL
Principal Consultant

Piccadilly House
100/101 Regent Street
London W1 4NF



SYSTEMS MANAGEMENT PROGRAMME

W. EUROPE (1990)

THE MANAGEMENT PROBLEM



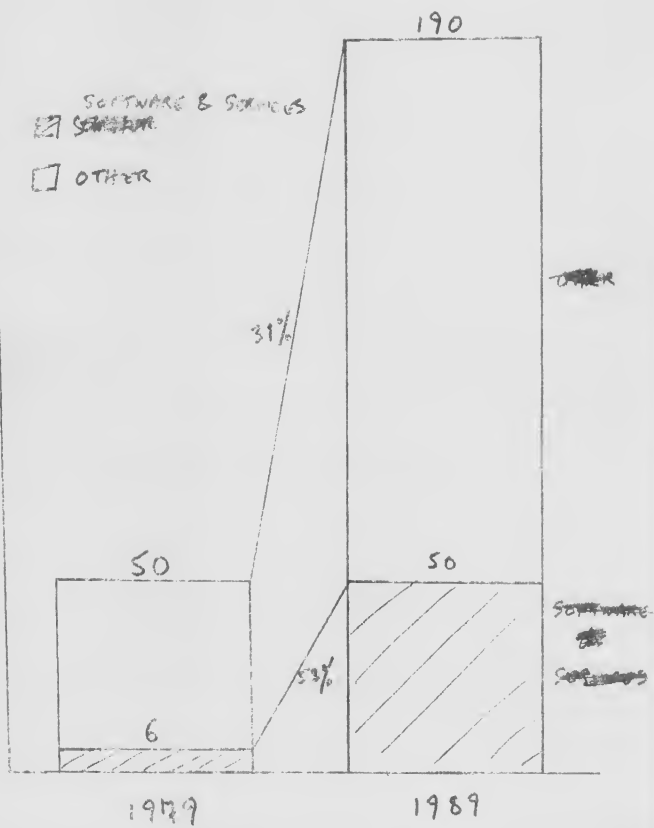
Topics

- MARKET SIZE
- MARKET STRUCTURE
- MANAGEMENT PROBLEM
- BUSINESS IMPLICATIONS



1. EXPORTS - WEAR

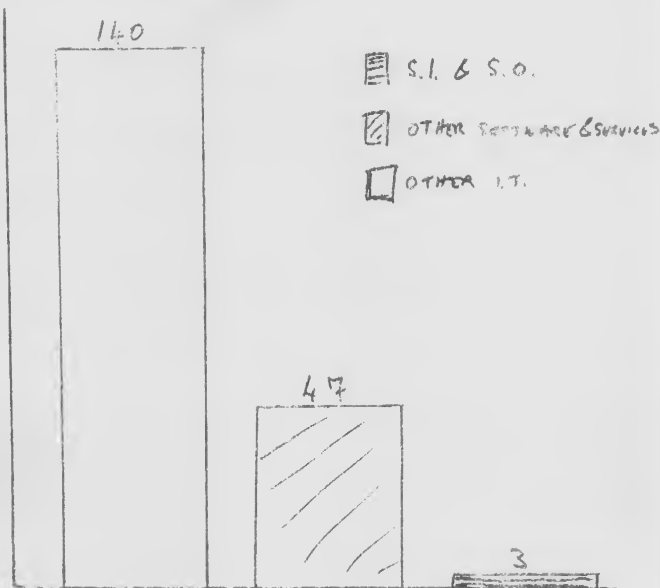
US \$
Billions





1. I.T. EXPENDITURE EUROPE (1959)

US \$
BILLION



TOTAL = \$190 BILLION




Andrew

It would be great if you could do the next slide with graphics instead of words.

In the first box instead of CONSULTING could you put pictures of smart guys and gals in suits with brief-cases.

In the second box instead of DEVELOPING ^{Programmer} could you put smart casual guys and gals typing in on V.D.'s.

In the third box instead of OPERATING could you put guys in tee-shirts and jeans holding ^{Computer} tapes.  or disks?

In the fourth box instead of MAINTAINING could you put guys in coveralls with tool-box.

If this is not possible, just leave it as it is.

Thanks.



MANIFEST STRUCTURE

CONSULTING

DEVELOPING

OPERATING

MAINTAINING



CHANGING MARKETS

- GROWTH
- PROTECT CLIENT BASE
- RESPONSE TO CLIENT
- DOOR-OPENING



TH D.P. MANAGEMENT PROBLEM

- DATABASE
- METHODOLOGY
- QUALITY ASSURANCE
- DEVELOPMENT TOOLS
- STAFF

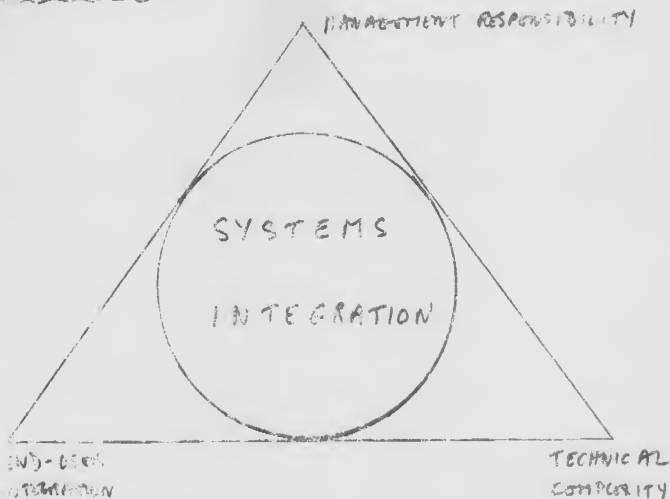


THE CORPORATE MANAGEMENT PROGRAM

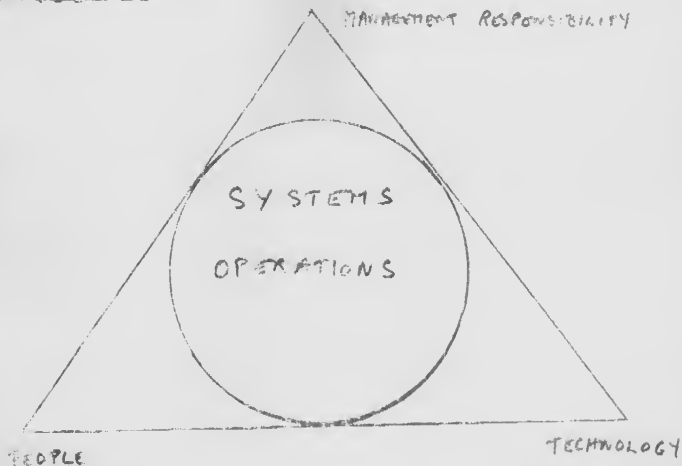
- CHANGING MARKETS
- DIFFERENTIATION
- TECHNOLOGY
- SCOPE
- D. P. DEPARTMENT



SYSTEMS INTEGRATION



SYSTEMS OPERATIONS



12

13

14

Total I.T. Expenditure Worldwide (1989)

US \$
Billion



- S.I. & S.O.
- ▨ Other Software & Services
- ▤ Other I.T. Expenditure



1980's

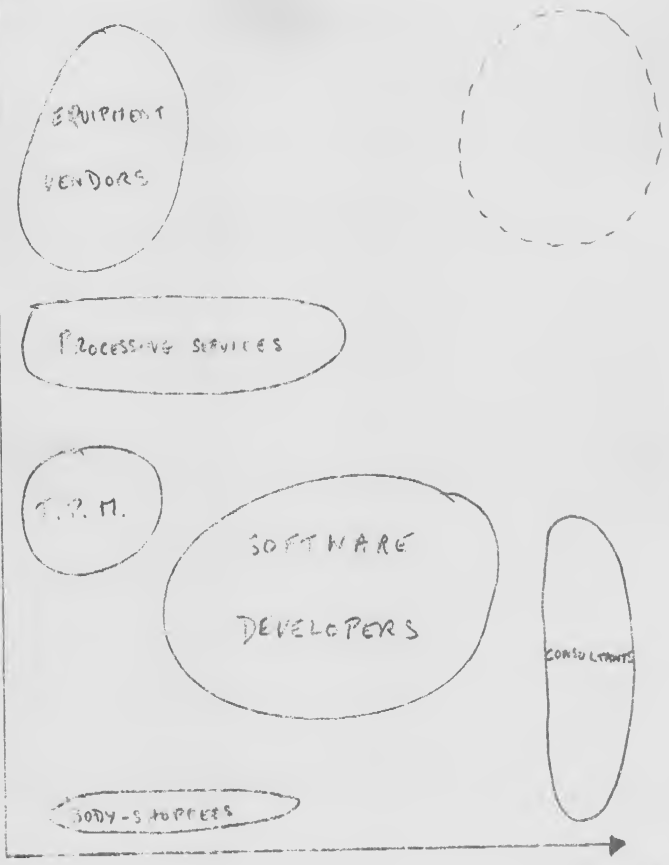


1990's





POSITIONING
MANAGEMENT
EXPERTISE

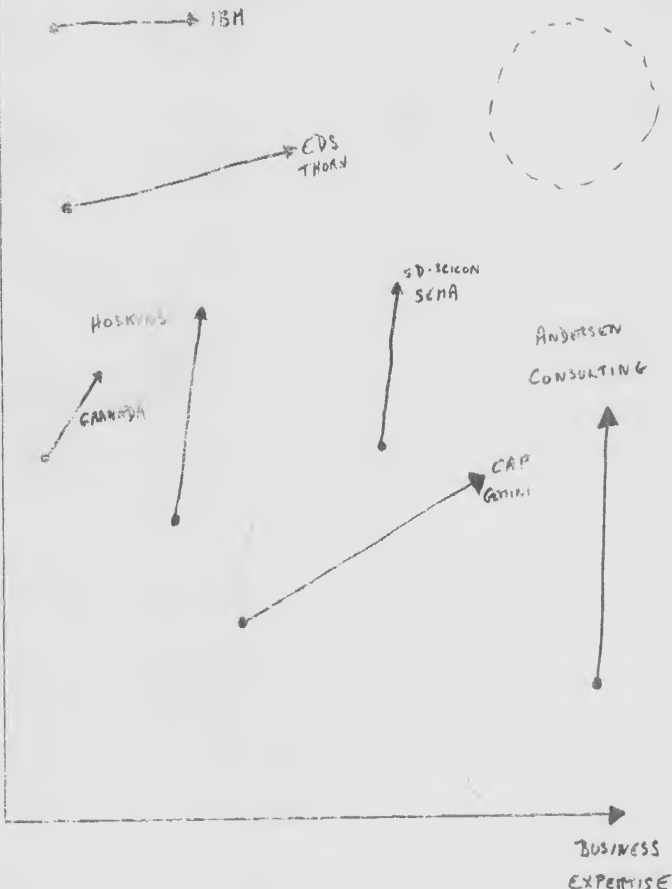


BUSINESS
EXPERTISE



Positioning

MANAGEMENT
EXPERTISE





Business Implications - Opportunities

- High Value
- Strong Client Relationship
- Account Development
- Account Protection
- Market Leadership
- Industry Markets

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Bus - ops Indications - Challenges

- Long-term
- High Investment
- High Risk
- Skills
 - Project Management
 - Functional Management
 - Account Management
 - International Capability

System Management Programs

• Systems Integration & Systems Operations

- Trends
- Size and Structure
- Industry Markets
- User Attitudes
- User Experiences
- Technology
- Vendor Activities
- Profitability
- Skills
- Other Issues



CONCLUSION

MANAGEMENT PROBLEM



MANAGEMENT OPPORTUNITY

